

# **MCC Procurement Guidance Note: Writing and Reviewing Terms of Reference**



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This attachment provides guidance to the MCA Entity on developing Terms of Reference (TOR) in accordance with the paragraph P1.B.2.2 of the Program Procurement Guidelines.

## **Purpose and Function of the Terms of Reference**

In the TOR, the MCA Entity describes in detail the consultant services it needs to purchase. The TOR is the document that provides the substance of the Request for Proposals (RFP). The following points should be considered when developing a TOR:

### **State the objective or purpose of the procurement:**

- Identify the needs of the MCA Entity.
- Provide as much information as possible to describe the MCA Entity's vision of the assignment.
- Consider that the TOR will be read by outsiders who have little or no knowledge of the Project, but are expected to propose a methodology and price for undertaking the assignment based on the information provided in the TOR.
- Do not be too "prescriptive" in the TOR (including using restraint in defining the staffing requirements) to allow and encourage consultants to propose their own methodologies for performing the services and providing the deliverables.

### **Provide a clear description of the background and context:**

- Ensure that the context of the TOR is described so that a consultant can easily understand it. Emphasize how this contract fits into the overall compact program and why the proposed assignment is important for the Project.
- Describe the history of the Project and the tasks already completed, if applicable.
- Describe how work carried out under this contract is linked and sequenced with work done by other consultants. Be explicit about required coordination with other consultants, contractors or government institutions.
- Identify other donors who are involved in the Project or could have an impact on the assignment.
- Include, when appropriate, an annotated list of the institutions that the consultant will be supporting or interfacing with, so that the consultant can clearly understand the interactions and the full Project. Explain the relationships within and among these institutions for purposes of delivery of the services being supported. Do not assume that the consultant will intuitively know or understand this.
- Include any publicly available studies or references (MCC guidance papers, compact documents, etc.) relevant to the work. Provide a list of special studies and documents that will be made available to the selected consultant.
- If the procurement includes associated goods, include a description of the goods and the

performance standards or functions to be achieved. Be sure that the technical specifications accurately reflect the minimum requirements and do not favor a certain brand or unfairly discriminate against certain brands.

## **Clearly describe deliverables and required resources:**

- Ensure that tasks are clearly described and numbered, and deliverables are explicitly stated. Ensure that the proposed deliverables are within the approved work plan and the scope of the activities described in the compact.
- Include a period for the performance of the service and an anticipated timeline for submission of deliverables by the consultant. Where comments on interim deliverables are to be provided by the MCA Entity or decisions are to be taken by the MCA Entity affecting further work of the consultant, indicate such requirements and the timeframe for MCA Entity inputs.
- Be precise in defining those deliverables for which precise parameters are required (e.g., special surveys, mapping).
- Include, if appropriate, a clear estimate of the amount of staff time, stated in workdays or work-months, needed to perform the services.
- Include, when appropriate, the required staff needed and key personnel positions.
- Include, when appropriate, the required staff qualifications, especially for key personnel.
- Describe the language requirements during contract performance, such as the language needs for staffing the working environment, giving oral presentations, and delivering interim and final reports.
- Describe types and numbers of reports to be produced, special formats, and software requirements (e.g., Excel spreadsheets, Auto CADD drawings).
- Define what the MCA Entity will provide to support the assignment, for example, counterparts, office space, phone, Internet connection, and printing.

## **Special guidance for procurement of Monitoring and Evaluation services:**

- Clearly identify any data collection requirements: what data are needed; how frequently they should be collected; which units and definitions are to be used for indicators; and what measures or mechanisms should be employed to safeguard quality of data.
- Describe reporting format (such as electronic file type, software to be used, hard copy, etc.) so that those involved with monitoring and evaluation can aggregate reporting and data collected across implementers.
- Describe, where relevant, the impact evaluation methodology to be used and any accommodations that would be needed to conduct the impact evaluation, such as the phasing of service delivery roll-out or the intake of beneficiaries.

## **Editing:**

- Spell check and proofread.
- When required, ensure adequate translation of documents into English.